

***California Legal Services (Title III B)***  
***PSA Level Quarterly Narrative Report***

**Fiscal Year: 2015-2016**

**Quarter: 1**

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**PSA: 1**

**Provider: Legal Services of Northern California**

**Counties: Humboldt, Del Norte**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 2**

**Provider: Legal Services of Northern California**

**Counties: Lassen, Modoc, Shasta, Siskiyou, Trinity**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 3**

**Provider: Legal Services of Northern California**

**Counties: Butte, Colusa, Glenn, Plumas, Tehama**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 4**

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**Fiscal Year: 2015-2016**

**Quarter: 1**

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**Provider: Legal**

**Counties: Nevada, Placer, Sierra**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**Provider: Yuba Sutter Legal Center**

**Counties: Sutter, Yuba**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**Provider: Legal Services of Northern California**

**Counties: Yolo**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**Provider: Sacramento Senior Legal Services**

**Counties: Sacramento**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 5**

**California Legal Services (Title III B)**  
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**Quarter: 1**

**Provider: Legal Aid of the North Bay**

**Counties: Marin County**

Optional Success  
Story(ies)/Case Summary(ies)

A married couple in their 80s came to LAM after receiving a notice from the sheriff saying they'd be evicted in a couple days. They both had physical and mental impairments. LAM attorneys realized they had given Power of Attorney to a con artist who had not been paying their rent for them like they'd believed. LAM attorneys went to court, halted the eviction, and got a volunteer attorney to revoke the POAs and give authority to family members who could pay their rent for them. LAM found a volunteer attorney to negotiate with the landlord and allow them to catch up on 12 months of unpaid rent. A very low income senior who has a Section 8 voucher came to LAM after receiving a notice that her voucher would be terminated. The termination of her housing benefits --which would have led her into homelessness--was based on allegations from a former landlord that she had damaged the unit. However, the unit had been damaged prior to her tenancy and many of the alleged damages were due to the landlord's failure to maintain the property. A LAM attorney intervened and advocated on the senior's behalf before the Marin Housing Authority. The termination notice was revoked, and our client was able to keep her housing subsidy.

Another very low income, disabled senior was facing eviction due to an unfounded allegation that she had an unauthorized occupant in her apartment. The alleged occupant was someone the senior had never heard of. A LAM attorney intervened, presented evidence to the landlord, and the landlord dismissed the eviction lawsuit.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 6**

**Provider: Legal Assistance to the Elderly**

**Counties: San Francisco**

Optional Success  
Story(ies)/Case Summary(ies)

Client is a 71 year old man, who rented a room in a single family house for close to 25 years. In recent years his rent was reduced in exchange for providing care to his landlord. Recently, his landlord was hospitalized and ultimately relocated to another state in order to be close to his brother. Client was subsequently served with an eviction alleging he was a lodger. We disputed the landlord's allegation, since the landlord no longer occupied the dwelling. Landlord dismissed the case on the day of trial.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Working with Asian Americans Advancing Justice (Asian Law Caucus), Asian Pacific Islander Legal Outreach and La Raza Centro Legal, we continue to collectively write and publish approximately 10,000 copies of a multi-lingual (English, Spanish & Chinese) "Senior Rights Bulletin". This publication, which comes out twice a year, educates seniors on a variety of issues, including tenant's rights, public benefits, avoiding elder abuse and consumer/ debt collection issues.

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**Provider: La Raza Centro Legal, Inc.**

**Counties: San Francisco**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

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**Provider: Nihonmachi Legal Outreach dba API Legal O**   **Counties: San Francisco**  
**Outreach**

Optional Success  
Story(ies)/Case Summary(ies)

In the API immigrant population that we serve, we have seen an increase in identity theft among our elders. One recent case was brought to us by a community based organization: A caseworker called regarding a client who just received a notice to vacate. The notice stated that the client no longer was eligible for the low-income unit because a check on client's resources indicated income she had not disclosed.

After our initial meeting with the client to review and discuss the letter, we thought it may have been an error because the client was not working, and her income/resources had not changed. We decided to run a free credit check as the client had never reviewed her own credit report. She told me "Why do I need to do that? I do not have any credit cards or loans so no need."

From the credit report we learned that her social security number was being used by someone out of state who had opened up a credit card. We contacted social security about the fraudulent use of a social security number, closed the credit card account so that the client was not responsible for any of the debt, and put a fraud alert on her name and social security number. We were able to clear up her housing issues so she did not have to move.

We have now started recommending and assisting our elder clients in running free, yearly credit reports.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We have been a member of the San Francisco Long Term Care Coordinating Committee (LTCCC) that advises the Mayor on issues around services for Elders and Adults with disabilities in San Francisco. We collaborate with the LTCCC subcommittee on Housing, specifically addressing the current housing crisis for elders and the disabled.

We also work with the Family Violence Council and Department on the Status of Women around issues of Elder abuse. As founding and active members of the Asian Pacific Islander Elder Abuse Task Force, we meet regularly with several community based agencies as well as the DA's office, Victim Witness services and Adult Protective Services to discuss issues around Elder Abuse. We discuss best practices as well as how each agency/organization can work to better serve the limited English-speaking elder and disabled communities.

We are a legal and technical resource for all of our partners and collaboratives in the area of elder law and elder abuse.

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**Provider: Asian American Advancing Justice - Asian L**   **Counties: San Francisco**  
**San Francisco**

Optional Success  
Story(ies)/Case Summary(ies)

Client N came to us some time ago, to help her daughter who was a target of an Owner Move In eviction. She was concerned by the behavior of the landlord, and while we assisted her daughter, we also advised Client N and the rights and duties of both her and her landlord, including her mother and co-tenant who is over 90 years old.

Later, Client N returned, with some disturbing reports of landlord harassment, and several legal notices she received, including accusations she was running a day care, had illegal subletters, and, perhaps most ominous, an attempt to modify the lease to allow the landlord to collect attorney fees in case of an eviction.

We helped Client N by writing a letter categorically denying the accusations and demanding the end of the harassment and abuse she has been receiving. While we still anticipate a legal case may arise from this issue, for now, Client N has reported no new abuse or events taking place at her home of nearly 20 years.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 7**

**Provider: Contra Costa Senior Legal Services**   **Counties: Contra Costa**

Optional Success  
Story(ies)/Case Summary(ies)

During this quarter, staff at CCSLS had several matters that resulted in seniors being able to stay in their homes. For example, in one case, a 73 year-old Richmond resident was served with an unlawful detainer. The management agreed, after nearly a year of negotiations, to a stipulation that allowed the client to remain in her subsidized housing. In another matter, an Antioch client who suffered from a hoarding disorder, was allowed to stay in his home after receiving a termination of tenancy. Our attorney negotiated a settlement in which the disabled senior agreed, with the help of community resources, to declutter and clean. The result was that the client avoided eviction and was provided with resources to help him comply with his rental obligations.

Optional Information on  
Collaboration with Other  
Advocacy Groups

CCSLS entered into an MOU with the Family Justice Center and will have appointments with clients in the Richmond office starting next month. CCSLS continues to partner with JFKU law school in providing free estate planning to low income seniors.

**PSA: 8**

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**Provider: Legal Aid Society of San Mateo**

**Counties: San Mateo**

Optional Success  
Story(ies)/Case Summary(ies)

Mr. J is 71 years old and suffers from multiple sclerosis. His wife is also disabled and needs constant care. Several years ago, they obtained a restraining order against one of their sons, Jimmy. Recently Jimmy, who has a drinking problem, started visiting again. He began staying over at their home and verbally abusing Mr. J. Mr. J began to feel threatened in his own home. After Jimmy refused to leave, leading to an altercation, the police told Mr. J to contact Legal Aid for assistance. Legal Aid helped Mr. J file for a restraining order and represented him at the hearing. The court granted the restraining order, which forced the son to leave Mr. J's home and to stay away from him. Mr. J is now able to concentrate on caring for himself and his wife.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We continue to work closely with AAS social workers and APS to assist seniors who are being abused by relatives/caregivers. We have just set up a more formal referral system for the DAs who are working on elder abuse issues that are more civil than criminal in nature. They have also invited us to meet with the new Elder and Dependent Adult Protection Team (EDAPT) that Measure A is funding to increase collaboration between the DA and Aging And Adult Services.

Our Senior Advocates Emeritus Attorney, Jay White, has also created a monthly e-newsletter to inform senior centers and other service providers about the latest financial scams targeting seniors.

**PSA: 9**

**California Legal Services (Title III B)**  
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**Provider: Legal Assistance for Seniors**

**Counties: Alameda**

Optional Success  
Story(ies)/Case Summary(ies)

Legal Assistance for Seniors assisted a 83 year-old woman in her naturalization proceedings.

Ms. G is unable to learn English and U.S. history/civics because of health conditions. Ms. G's children tried on multiple occasions to teach her English but as her health declined, it became apparent that she would never be able to pass the English and U.S. history portions of the naturalization interview.

Ms. G longed to become a U.S. citizen so she could be free to travel in and out of the country. Four of her eight children remain in her home country,. Ms. G and her family longed for a day when she would be able to stay for an extended period of time without fear of losing her permanent resident status.

LAS worked with Ms. G's doctor to submit a disability waiver request that was accepted by U.S. Citizenship and Immigration Services (USCIS). At the interview, the immigration officer, who was from the same home country as Ms. G, interviewed Ms. G in her native language.

Ms. G passed her naturalization interview and her application for citizenship was approved. In July 2015, Ms. G became a U.S. citizen. Ms. G's plans on applying for her U.S. passport as soon as possible

Optional Information on  
Collaboration with Other  
Advocacy Groups

Legal Assistance for Seniors (LAS) works closely with Alameda County APS to serve clients suffering from or at risk for elder abuse by providing legal services for clients in need of legal advice and/or protections. LAS has also been awarded the Alameda County HICAP contract and provides HICAP counseling services as well as legal services for HICAP clients. LAS collaborates with the Contra Costa County HICAP program and provides legal services for clients referred to LAS by Contra Costa HICAP counselors. LAS also works with the Alameda County Ombudsman to serve clients in residential facilities. Additionally, LAS works with the Alameda County Department of Children and Family Services to serve clients needing assistance in obtaining legal guardianship of minors. LAS' is a participating agency in the Northern Alameda County Kinship Collaboration and provides legal services to relative caregivers of minors. LAS also maintain collaborative relationships with the State Bar of California and the cities of Alameda, Fremont, Hayward, Livermore, and Pleasanton to provide legal services to seniors as well as educational presentations and referrals to other community resources.

**PSA: 10**



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**Provider: Senior Adults Legal Assistance (SALA)**

**Counties: Santa Clara County**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 11**

**Provider: Council for the Spanish Speaking**

**Counties: San Joaquin**

Optional Success  
Story(ies)/Case Summary(ies)

July 2015 was a great month for Senior Legal Services. We exceeded our units of service, which was a great way to start the fiscal year. Donations were excellent as well. Senior Legal Services collected \$415.00 in donations for a month. As always, clients are informed that services are free of charge, but donations are accepted.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Senior Legal Services was able to do a presentation on Friday, July 16, 2015, at Artesi III Migrant Child Care Center located at 777 West Matthews Road in French Camp. The presentation was conducted in Spanish by Program Coordinator Leo Galvan. The parents and grandparents had lots of questions about the services offered.

El Concilio's Senior Legal Services and Caregiver Legal Services Program co-sponsored an Alzheimer's Awareness worksho along with the Alzheimer's Association for the Spanish speaking community in San Joaquin Couty. Alzheimer's Association reached out to El Concilio because of the huge impact we plan in the Spanish speaking community. They usually charge for their presentation, but because we are a non-profit, we were eligible for a scholarship and a free workshop. The workshop was free to the public.

They also provided a free pdf flyer for the workshop to El Concilio could distribute it throughout the community. Alzheimer's Association was very excited about the turnout and informed Program Coordinator Leo Galvan that it as their biggest turnout for a Spanish Alzheimer's Awareness workshop in San Joaquin County. Program Coordinator Leo Galvan was also able to promote the workshop in a quick segment with Spanish television network Univision on their local television show, "Despierta Sacramento."

**PSA: 12**

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**Provider: Catholic Charities**

**Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu**  
**mes**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 13**

**Provider: Senior Citizens Legal Services**

**Counties: Santa Cruz, San Benito**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 14**

**Provider: Central California Legal Services, Inc.**

**Counties: Fresno, Madera**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 15**

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**Provider: Central California Legal Services**

**Counties: Tulare**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**Provider: Central CA Legal Services Inc.**

**Counties: Kings**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 16**

**Provider: California Indian Legal Services**

**Counties: Inyo, Mono**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 17**

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**Provider: Central Coast Commission for Senior Citizen**   **Counties: San Luis Obispo**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 18**

**Provider: Grey Law of Ventura County**

**Counties: Ventura**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 19**

**Provider: Bet Tzedek**

**Counties: Los Angeles**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 20**

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**Provider: Inland Counties Legals Services**

**Counties: San Bernardino**

Optional Success  
Story(ies)/Case Summary(ies)

Case #1: 15E-6005525:

The client and her husband lived in a mobile home park for many years that was owned by a husband and wife. The husband is now deceased and the wife, who is quite elderly, still lives in the park but is unable to manage it any longer. She hired new managers who were family members who did not want to manage the park. She then decided to hire from the outside.

She hired a couple that had prior experience managing Section 8 housing. These new managers sent out documents to all of the park tenants to sign or face eviction. The mobile home park has no rentals; all of the tenants own their own mobile homes. The client provided the ICLS advocate a copy of the paperwork who then reviewed them with the managing attorney.

Various problems were discovered with the documents the tenants were being told to sign including requests that are against public policy and HIPPA violations. The managing attorney sent a letter to the owner as well as the new managers addressing these issues. The owner was somewhat miffed that someone would address these issues and decided to call a meeting of all seven of the owners (there had not been a face-to-face meeting amongst them in almost twenty (20) years as they live in various states). The owners decided to hold a face-to-face meeting with the tenants and speak with them.

Most of the issues that had been bothering the tenants were addressed such as trash pickup, use of the pool and spa, repair of many things that had been broken for years, etc. The issue of the harsh managers was also addressed and the owners said that they would speak with the managers and take care of the issue. It appears that through the intervention of the ICLS paralegal and managing attorney the mobile home park owners were willing to regroup and take care of the tenants concerns.

Case #2: 15E-7006108:

ICLS's 78 year old client had a step-mother who had been in a board and care facility and was the victim of elder financial abuse. The client and her brother attempted to handle the affairs regarding the step-mothers home and money but they were given advice from a real estate agent that there was a lien against the home. As the client and her brother believed that the home would not be able to provide for their step-mother, and she would not give them authority to act on her behalf, they had stopped their attempts to help her.

When the step-mother would have been 100 years old the client and her brother were contacted by the SSA who advised them that the real estate agent, who also owned the board and care, had been collecting their step-mother's SSA since her death.

The client was very grateful for the advice she had been provided by the ICLS advocate regarding the laws that would apply to her facts and appreciated finding out that she would have to seek legal assistance in the state where her step-mother died as well as the referrals provided to her on how to

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contact the Arizona State Bar for a referral to an attorney.

Case Story #3: 15E-7005997:

A severely disabled 64 year old senior was referred to ICLS by the San Bernardino County Department of Health Care Services for assistance regarding his high MediCal Share of Cost. He suffers from FH AAM with Spinocerebellar Atrophy which is a neurodegenerative disease that affects an individual physically. The individual's ability to get around requires the use of a walker or wheelchair and their ability to communicate is also affected because their speech is slurred. Due to his medical condition he requires constant medical attention. Before MediCal will cover any of his medical expenses the client is responsible to pay his Share of Cost of \$791 per month which he cannot afford on a monthly basis. His income is \$1,400 per month and his rent is \$600 per month. The ICLS advocate advised the client that he is required to pay the \$791 per month only in the months that he has medical expenses. Any given month where his medical expenses exceed \$791 in a month MediCal will pay the difference. The advocate advised the client that there are other MediCal programs and that he could look into getting other insurance, but that based on the information he had provided to the advocate and due to his situation he should look into applying for the MediCal 250% Working Disabled MediCal Program, which he would qualify for if he was able to do any type of work and get paid for it. In order to qualify for the 250% Working Disabled MediCal Program he must be disabled and, determined to be disabled by Social Security and receive disability income, even though his disability income (SSDI) would not be countable. She further advised that under this program he would be required to pay a monthly premium based on the income he earns from working. If he is able to do any type of job such as watch his neighbor's home while they are at work, water their lawn, feed their pets, etc. it does not matter how many hours he works or how much he gets paid as long as he can prove that he has an employer/employee relationship and proof of his wages. The advocate also advised the client that when he turns 65 years old his SSDI will automatically convert to Social Security retirement. At that time he may need to provide documentation proving that even though he is no longer receiving disability income he is still disabled and his Social Security income was originally SSDI. If, at that time, MediCal insists on counting his Social Security income he should request a hearing and contact ICLS for legal assistance. The client was provided with written information on the MediCal 250% Working Disabled Medi-Cal Program and on how to apply. The client was very grateful for the assistance and information that was provided to him by ICLS.

Case Story #4: 15E-7006918:

A 79 year old divorced senior requested assistance from ICLS regarding a Discover Credit Card debt in excess of \$4,000. The client had received a notice from Western States Financial offering their services to resolve the lawsuit filed against her for a fee. The client had not been aware that a lawsuit had been filed and was concerned because she is not able to pay and was concerned that they would try to take her motor home which she lives in and parks in her daughter's backyard. Her only income is from SSA and SSI and she does not have the means to pay this debt. The client had allowed her daughter to use her credit card because the daughter was in an abusive marriage and needed money to get away from the abusive husband and obtain a divorce. The daughter had promised to pay her mother back.

The ICLS advocate checked the Court website and confirmed that a lawsuit had been filed on July 15,

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2015 but no Proof of Service had been filed with the Court. The advocate advised the client that her income was exempt (protected) and that they would not be able to take her motor home away because it is her principal residence. The advocate also advised the client that she would first need to be served with the lawsuit and once served; she would need to decide if she wanted to file a response with the Court or do nothing and to contact the advocate when she was served.

A few weeks later the client contacted the advocate because her daughter had given her \$3,000 to payback part of the money she owed the client. The client wanted the advocate to negotiate on her behalf and see if they would settle for \$3,000 as payment in full. When the client informed the advocate at their meeting that she did not have a physical address for her mail and that she receives mail at a PO Box the advocate checked the Court website again for status on the case. It still indicated that the client had not been served. The advocate advised the client that because they have been unable to serve her it is very possible that they would accept the \$3,000.

The advocate contacted counsel for Discover Bank and found that the total amount due was \$4,713.73 and was successful in negotiating a settlement on the client's behalf in the amount of \$2,830 as payment in full. The client was very relieved and thankful for the assistance that ICLS had provided her with.

Optional Information on  
Collaboration with Other  
Advocacy Groups

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**Provider: Inland Counties Legals Services, Inc.**

**Counties: Riverside**

Optional Success  
Story(ies)/Case Summary(ies)

Case #1: 15E-4003667:

The ICLS client was an 83 year old disabled male who was trying to get his ex-wife's monthly facility rate reduced from \$1,875.00 to \$1,034.00 retroactive to the month of March 2015. The advocate was instrumental in saving the client a total of \$4,205.00 in the retroactive rate reduction. Additionally the client he will be able to save \$841.00 per month going forward. The client made payments to this assisted living facility of \$1,875.00 a month from April 2014 through February 2014. The client is no longer responsible for paying part of the monthly facility rent from his own retirement benefit.

Case #2: 15E-2006609:

The client was a senior who wanted to add her son to the title of her home but the son was in the process of obtaining a divorce and had financial as well as IRS issues. The ICLS advocate explained to the client (using a California Bar Association brochure written for the public) the difference between a Will and a Trust. Additionally she explained to the client that if she were to add her son to the title of her home and her son was to be sued, a judgment could be obtained against him (for example the IRS could come after him) and put a lien against the property. With his name on the title he could also obtain a loan against the property that could force a sale against the property.

The client was horrified and did not want to take the risk at this time by adding him to the title. For the client's wants and needs to avoid Probate if possible and to leave the home to her son after her passing without it needing to go to court the advocate explained that she would be best served by a Trust. The advocate explained the differences between the two as to naming beneficiaries for your property and used the example that with a Will you simply describe the property and list who should get it. Using a Trust, you must do that and also "transfer" the property into the Trust to avoid Probate. Property that is left through a "Living Trust" does not pass through Probate. Property that is left through a Will does go through Probate. Probate is the court system designed to wrap up a person's affairs after their death.

The advocate also explained to the client that Probate can take a long time, can be very expensive, and for most estates, isn't necessary. Because all property that is passed through a Living Trust does not have to go through Probate it can be distributed to beneficiaries after the death of the grantor without any fees or interference (or guidance) from the court. For this reason some people choose to create a Living Trust. After death a Will becomes a public document and a Living Trust does not, so many people choose to use a Living Trust to keep their affairs private. To leave property through a Living Trust you must transfer the property into the trust. For many items this is as easy as making a list of the property and attaching it to the Trust document, however, items with title documents such as real estate, must be retitled so that the owner of the property is the Trust. This is not usually complicated or particularly difficult, but it is an extra step that must be taken. No transfer of property is required when using a Will. The ICLS advocate further advised the client that she should see an estate attorney who can explain a Trust and Will to her more adequately and she could then determine which would be best suited for her circumstances and wishes.



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Case #3: 15E-4007979:

A 64 year old monolingual Spanish speaking client with a SSA retirement monthly income of \$887 came to ICLS to seek assistance in having her divorce case finalized and judgment entered for help. She had been told at the courthouse that she had not been divorced in her 1990 divorce case. She stated that there had also been a pension plan that needed to be divided. She remembered that the pension plan had been addressed in the Court proceedings but that she had been awarded only \$1000. She was unclear as to what the exact orders were regarding the pension plan. At this point she is mostly concerned about having her divorce case finalized and being divorced.

The ICLS advocate looked up the Court Docket and discovered that there had been quite a few hearings regarding custody, support and the pension plan. The advocate assisted the client in calling the Family Law Clerk to find out if there had been a judgment in the case. Per the Family Law clerk, the case is still pending and no judgment had been entered. The advocate then assisted the client in preparing a Fee Waiver and Order to obtain copies of the documents that had been filed in her case – she had no documents with her.

The client returned to the advocate with the documents she obtained from the Court and the advocate reviewed them with her. Although the Court Docket did not show that the client was divorced, in an ex-parte opposing filing the opposing party had attached a copy of the file stamped Divorce Judgment filed December 20, 1990. The advocate explained to the client that it appears that she had been divorced but that she would need to confirm this with the Court. She advised the client to return to the Court and ask for a copy of the Divorce Judgment from the 1990 case and that the clerks would need to pull the file from storage and review it.

The client was very happy to learn that there was a judgment and that she is divorced; but that it was just not showing on the Court Records. The advocate further advised the client that the pension plan had been addressed in the judgment and had been divided accordingly; therefore there were no issues outstanding. The client was very happy that she was divorced and thanked the ICLS advocate for the services that had been provided.

Case #4: 15E-4006939:

The ICLS advocate assisted a 60 year old disabled client obtain retroactive MediCal benefits to avoid having to pay high medical bills that had not been covered by her private medical insurance. The medical bills were related to knee replacement surgery and aftercare treatment services.

Health Net was the client's primary insurance under the Cover California program at the time she had her knee surgery and the client did not know that she was eligible for full MediCal benefits for the month of July 2015 due to the reduction in her household income. The client was approved for MediCal benefits on August 25, 2015 with benefits retroactive to June 2015. The client has been able to get free medical services under MediCal program since August 25, 2015.

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Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 22**

**Provider: Legal Aid Society of Orange County**

**Counties: Orange**

Optional Success  
Story(ies)/Case Summary(ies)

We recently represented an Orange County resident in a Medi-Cal estate claim hearing. The client had resided with her elderly mother in a mobile-home and provided care for her for many years. Her mother was diagnosed with post-stroke dementia, including wandering. When the mother's condition worsened, she moved to a nursing home. When client's mother passed-away, Medi-Cal sought reimbursement of about \$35,000. Although the client had submitted a hardship waiver, it had been denied. We assisted the client with the administrative appeal. At the hearing we were able to show that the client had provided care to her mother which had delayed her entry into the nursing home. We also showed that the mobile-home needed substantial repairs and that, although client had some savings, her monthly expenses exceeded her income and she was depleting her savings to meet living expenses. The Hearing Officer granted the client's waiver request.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We have been participating in the Orange County Hoarding Task Force meetings. We have a small but increasing number of cases involving hoarding issues and have found the resources and insight of task force members to be very valuable in working with our clients and seeking to resolve their legal issues. We have also been able to address legal issues raised by other task force members.

**PSA: 23**

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**Provider: Elder Law & Advocacy**

**Counties: San Diego**

Optional Success  
Story(ies)/Case Summary(ies)

**Success Story #1**

Our 63-year-old client had an EBT Card and is receiving a food stamp subsidy. On June 12, 2015, she used her EBT Card to make a food purchase of \$30.90 at a grocery store. Unfortunately, after bringing her purchase home, Client was not satisfied with the product and returned it to the store for credit to her EBT Card. Instead of charging back her EBT Card for \$30.90, the store inadvertently charged Client's EBT Card again for \$30.90. Client was then out a total of \$61.80 and had no food item. Despite numerous visits to the store and discussing this with the store management, Client was unsuccessful in getting the total charged amount properly restored to her EBT Card. The Elder Law & Advocacy staff attorney wrote a letter to the store demanding that due to the financial hardship this is causing Client, the store should give this matter immediate attention and charge back to Client's EBT Card \$61.80. The store acted quickly, based on the staff attorney's letter, and properly charged back the card. The store also gave client a gift card to make up for her inconvenience.

**Success Story #2**

Our 76 year old client signed a lease on April 29, 2015. On April 30, 2015, the building was sold. On May 12, 2015, Client received a 60 day notice to quit. Elder law & Advocacy's staff attorney wrote a strong letter to the landlord stating that the sale of the building was subject to the lease and that their attempt to evict her was not only a violation of landlord/tenant law, but was abusive. The letter outlined the numerous damages available to this elderly client, given her age. Our client was immediately contacted by the management and given assistance in multiple ways to assist her to transition to a new location. The manager is working closely with her and the deadline has been withdrawn.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 24**

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**Quarter: 1**

**Provider: Elder Law & Advocacy**

**Counties: Imperial**

Optional Success  
Story(ies)/Case Summary(ies)

1. Our client, a 65-year old monolingual Spanish speaker, with several health issues, was extremely upset due to harassing conduct by her estranged daughter in law. Our client's adult son currently lives with Client, as he is separated from his wife. Client's son shares custody of Client's grandchildren with his estranged wife, however they have a volatile relationship and much of the harassment happened during custody exchanges. In the past, Client's daughter in law had broken a window at the home and repeatedly verbally harassed Client for years. Client was called names such as "old hag" and "crazy ... old lady."

Client's daughter in law recently came to Client's home intoxicated and wanted to pick up her children (Client's grandchildren). The daughter in law became violent with Client's son and threw Client's outdoor planter at him. The police were called to the scene and Client fainted during the incident due to the stress of her estranged daughter in law's conduct. This incident prompted Client to seek our assistance as she wished to be able to live peacefully in her home. Our staff attorney assisted client by preparing court forms to request an elder abuse temporary restraining order, which was granted. After two court hearings, the judge granted Client an order prohibiting this type of conduct by daughter in law's for a period of three years.

2. Client's daughter first came to our office when her mother was hospitalized and could not attend a court hearing. Client's daughter was able to informally request that the court continue her mother's court hearing, and her mother later requested assistance from our office. Client, a 66-year old monolingual Spanish speaker, had a spousal property petition pending before the court, due to the fact that her husband passed away and two of their properties only included his name on the title. One of Client's children had apparently hired an attorney to prepare the petition, however Client's petition was defective. Our staff attorney assisted Client in fixing the defects, and also discovered partially incorrect property information in the petition.

The mistake occurred because Client and her late husband owned two properties adjacent to one another, and the information contained in the petition described the wrong lot. After using online research to determine the correct property information, Elder Law & Advocacy's staff attorney prepared an additional declaration and an amended order for the client to file with the court. The judge reviewed the documents and granted the spousal petition order, thus protecting Client's interests and allowing her to transfer both properties to her name, as the surviving spouse.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 25**

***California Legal Services (Title III B)***  
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**Provider: Bet Tzedek**

**Counties: Los Angeles**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 26**

**Provider: Legal Services of Northern California**

**Counties: Mendocino and Lake**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 27**

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**Quarter: 1**

**Provider: Legal Services of Sonoma County**

**Counties: Sonoma**

Optional Success  
Story(ies)/Case Summary(ies)

We have had several success stories over the past few months. Our clients have grappled with physical abuse, financial abuse and housing issues. One of our clients, a man in his 80's, was being financially preyed upon by the Church of Scientology. They had convinced him to turn over personal information which allowed them to open up credit cards in his name, and charge "classes" and other items that he never requested or used. The man's capacity is limited. But, even after his wife objected, the Church continued to send a representative to their house to maintain their hold over him. Legal Aid was able to obtain a protective order against that individual. In addition, a cease and desist letter to the Church, stopped all other forms of contact with the elderly gentleman.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Legal Aid has spent the last quarter reaching out to a variety of providers including senior centers, the Council on Aging and Jewish Family and Children's Services, to educate them about our new services and to learn more about the needs of their clients. Most recently we had a case, referred to us by the COA. Working on that case, which involved an elderly woman's housing, mental capacity issues, and financial abuse, we collaborated with the COA, APS, the District Attorney's office and the Ombudsman. It is a very complex case, but provided a good way for us to network and learn more about our co-providers.

**PSA: 28**

**Provider: Legal Aid of Napa**

**Counties: Napa**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

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**Provider: Legal Services of Northern California**

**Counties: Solano**

Optional Success  
Story(ies)/Case Summary(ies)

Twenty three low-income, disabled and senior residents of a mobile home park received notices informing them that a public hearing would be held to consider the landlord's A 90 year old woman suffering from advanced lung disease asked her housing provider to approve her adult son as her live-in aide. The woman provided supporting documentation from her physician as well as a letter from the housing authority authorizing her to have a live in aide. The live-in application was denied because the son had been convicted of "negligently discharging a firearm" more than ten years earlier. The son had no subsequent interaction with law enforcement and the underlying offense was an accident. LSNC informed the housing complex that their eligibility criteria violated federal and state law and demanded that the housing provider approve the application. As a result the housing provider agreed to waive their policy and allowed the son to move in. The son is now providing daily care to his elderly disabled mother.

lil. An elderly client discovered that the interest rate on her home mortgage was set to increase to a rate that she would not be able to afford. LSNC assisted the client with a mortgage modification application. As a result, the client received a favorable loan modification agreement and can now remain in her home.

Proposal to close the park and convert it to a vacant lot. LSNC agreed to represent the residents and spoke out against the closure at the planning commission hearing. Residents offered testimony detailing the devastating effect that the closure would have on their lives. LSNC argued that the proposed conversion did not comply with the City's Mobilehome Park Conversion Ordinance. As a result of these efforts, the landlord withdrew his application to close the park and agreed to donate \$100,000 over 10 years to promote affordable housing in the local community.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Continued collaboration with Senior Legal Hotline. Continued participation with community groups including: Solano Senior Coalition and Vallejo Senior Roundtable.

**PSA: 29**

**Provider: Senior Legal Services**

**Counties: El Dorado**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

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**PSA: 30**

**Provider: Dor V Dor Senior Advocacy Network**

**Counties: Stanislaus**

Optional Success  
Story(ies)/Case Summary(ies)

Resolved an issue wi a man who was conned intor purchasing a timeshare and we were able to get the purchase cancelled.  
Worked with Social Security who waived \$3500 overpaymwent leaving just \$500 to be repaid;  
Resolved 3 medi-cal liens through hardship or disability waivers.  
We printed 10,000 of our SCAM door hangers and provided them to law enforcement and other groups for National Night Out.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 31**



**California Legal Services (Title III B)**  
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**Quarter: 1**

**Provider: Central California Legal Services**

**Counties: Merced**

Optional Success  
Story(ies)/Case Summary(ies)

July 2015

CCLS Case No.: 14E-3003817 - (Social Security)

CCLS was contacted in 2014 by Client, a 72-year-old Winton woman, about an overpayment notice she received from the Social Security Administration (SSA). In its notice, the SSA alleged that it had overpaid Client in the amount of \$10,972.00, and that a discrepancy arose from its belief that Client was still married when she had in fact divorced her husband several years ago. Client claimed that she notified the SSA immediately upon the divorce, but it was not until her new husband died Sept, 2013, that SSA discovered its mistake. The Notice further informed Client that the SSA intended to withhold her monthly SSA benefits beginning September 3, 2014. CCLS Advocate helped Client draft and file a request for reconsideration, protesting overpayment, the withholding of back benefits, and the proposal to withhold her monthly SSA benefits. On July 22, 2015, Client contacted advocate and informed him SSA determined that she was without fault in causing the overpayment, she would experience a financial hardship if she was required to refund the overpayment, and therefore she does not have to refund the \$10,972.00 overpayment. Client's benefits will continue uninterrupted.

CCLS Case No.: 14E-3003817 - (Elder Abuse)

CCLS was contacted in June by Client, a disabled 75-year-old Merced man, regarding a domestic abuse issue. Client lives in his home, and has allowed his son, his son's girlfriend, and her two children to move into the house with him while they looked for a more permanent housing situation. After some time, Client's "guests" stopped cleaning up after themselves and began displaying a lack of respect for Client and his property. Client's disagreements with his son became violent one day when the son, upset after an argument, threatened and chased Client into his room. The son went in after Client, kicking the walker out from under him when he tried to get away. The son then proceeded to destroy Client's personal items right in front of him. Attorney met with Client and drafted and filed a request for immediate elder abuse restraining orders with the Merced Superior Court, which were granted. Attorney arranged for the Merced Police Dept. remove the abusive son from the home immediately, and instructed client on how to represent himself at the subsequent hearing on making the order permanent. Client prevailed at the hearing, was granted a "permanent" restraining order against the son. The son has since moved out of Client's home, and is ordered to stay 100 yards away from Client and his home.

CCLS Case No.: 15E-3004158 - (Elder Abuse)

CCLS was contacted in June by Client, a disabled 86-year-old Merced woman, regarding a domestic abuse issue. Client had been bullied by her grandson, who lived in her home since she allowed him to move in with her. The grandson would often declare, "This is MY house!" One evening after argument, grandson ordered Client into her room. Client complied, afraid for her safety. Grandson followed her into her room, locked the door behind them, and stood between her and the door. Client attempted to escape through her (first-floor) bedroom window. Grandson grabbed Client and pulled her away from the window. She called the police, but they told her it was a 'civil' matter because the grandson lived in the home. Client filed a request for elder abuse restraining orders against him with the Merced Superior Court. The court issued a temporary order that her grandson move out of and stay away from the home.

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Client and grandson reconciled in the presence of the Court on the day of the hearing, and the temporary order was allowed to expire pending a follow-up review hearing a month later. Immediately after returning home from the hearing, the grandson resumed his threatening and belligerent behavior towards Client. Attorney met with Client and drafted and filed an amended request for immediate elder abuse restraining orders with the Merced Superior Court, which were granted. Attorney agreed to represent Client at the hearing on making the orders permanent. Client was granted a "permanent" restraining order against the grandson at the hearing. The son has since moved out of Client's home, and is ordered to stay 100 yards away from Client and her home.

August 2015

CCLS Case No.: 15E-3005921 (Real Property – Reverse Mortgage)

Client, an 81-year old woman living alone in Merced, contacted CCLS for assistance in notarizing a real property document that would allow her to apply for a reverse mortgage loan. Through discussion, Attorney learned that Client needed the money to pay for her expensive Medicare supplement plan, and that Client has been on the same plan since the 1990s. Attorney advised client of the hazards and drawbacks of reverse mortgage loans, that newer, more affordable Medigap and Medicare Advantage plans have become available with ACA implementation, and that she should consider speaking with the Merced HICAP counselors about her coverage options before going through with the reverse mortgage. With client's consent, made referral to Merced HICAP counselors.

CCLS Case No.: 14E-3006160 (Real Property – Loan Modification)

Client, a 79-year old handicapped man living alone in Merced, Contacted CCLS for assistance in making a financial power of attorney. While Attorney was seeing to Client's needs, Client mentioned that he is having trouble with his mortgage payments. Attorney made referral to another advocate for review of client's potential eligibility for a home loan modification under the Keep Your Home California, HAMP, or HARP programs. After guiding him through the process and preparing and submitting the application materials, advocate secured a trial loan modification for Client.

CCLS Case No.: 13E-3008802 (Real Property – Foreclosure)

\*\*\*Notice: Pursuant to a confidentiality agreement, the identities of the defendants, as well as significant factual details and settlement terms have been deemed confidential and shall not be disclosed\*\*\*

Client, a disabled Merced County senior citizen came to CCLS for help with understanding certain items in her mail that looked important. Client suffers from poor vision and profound hearing loss, and has trouble reading and communicating. After reviewing several articles of her mail, Attorney discovered that her home of over 40 years had been recently foreclosed by her reverse-mortgage loan servicer. Soon after this discovery, the foreclosing bank served Client with an eviction lawsuit.

Because foreclosure on the reverse-mortgage loan of a living borrower is highly irregular, Attorney responded to the bank's eviction lawsuit to stall for time while reviewing the loan and foreclosure documents. Attorney later discovered that the loan servicer erroneously believed that the home was unoccupied, which would have given the servicer the right to foreclose. During this investigation, Client incurred certain expenses, fearful that she might be evicted.

After obtaining incontrovertible evidence that Client has continuously occupied her home, Attorney

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immediately filed a civil lawsuit against the involved parties in Merced Superior Court, demanding monetary compensation, and that the foreclosure be set aside. Attorney also took immediate steps to prevent Client's home from being sold to a third party. After two rounds of written discovery, and after the defendants twice failed to have the case dismissed, the bank abandoned its bid to evict Client from her home.

Wary of the costs and risks of further litigation, the parties agreed to engage in settlement talks. Two CCLS Attorneys represented Client during a full day of mediated negotiation before a retired federal judge, and the parties successfully reached a settlement agreement. As part of the settlement, the defendants agreed to convey the home back to Client, and to provide monetary compensation in an amount agreeable to Client. In exchange, Client agreed to dismiss the lawsuit.

After over two years of litigation against several major financial institutions, Client can rest easy knowing that her right to continue living in her home is no longer in doubt. Because of Attorney's swift actions, Client was able to enjoy uninterrupted residence in her home while the case was pending. The monetary compensation allowed her to recoup her expenses, and will hopefully also provide her some comfort coming out of this ordeal.

September 2015

CCLS Case No.: 15E-3006088 (Elder Abuse)

CCLS was contacted in July by Client, a disabled 60-year-old Merced woman, regarding a domestic abuse issue. She is undergoing a course of chemotherapy, and is on medication for pain and anxiety. Client also suffers from dyslexia, and is functionally illiterate. Communication with client was especially challenging due to her health conditions, which also limit her ability to communicate effectively with law enforcement, and prevents her from standing up for her rights. Client lives in her home, and has allowed her ex-girlfriend to move into the house with her. Over time, the ex-girlfriend began threatening Client, who began to notice items of her personal property have been vandalized or gone missing. Client asked her ex-girlfriend to leave, and she refused, saying "I'm not done cleaning you out yet." Client called the police and asked them for help in removing her from the home. The police told Client hers was a "civil matter," and that she needed a court order for them to take any action. Attorney met with Client, and drafted and filed a request for immediate elder abuse restraining orders with the Merced Superior Court, which were granted. Attorney then arranged for the Merced Sheriff to remove the abusive ex-girlfriend from the home immediately, and represented Client at the subsequent hearing on making the order permanent. Client had much difficulty presenting her story to the Court, but prevailed at the hearing with the aid of Attorney. Client would certainly not have prevailed without assistance. Client was granted a "permanent" restraining order against the ex-girlfriend, who is ordered to stay 100 yards away from Client and her home. Client can now feel safe and secure in her home.

CCLS Case No.: 13E-3008737 (Foreclosure Prevention)

CCLS was contacted in 2013 by Client, a 64-year-old Dos Palos woman. Client was facing the early stages of foreclosure on her home. Client had attempted to explore loss mitigation (loan modification)

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Optional Information on  
Collaboration with Other  
Advocacy Groups

options with her bank on her own, but did not get far. Attorney assisted client in the submission of applications for assistance with both her bank and with the Keep Your Home California program. Ultimately, client obtained a loan modification with more favorable terms, and assistance through Keep Your Home California's principal reduction program. Client was relieved, and is finally in a position financially where she can pay her mortgage irrespective of her husband's financial contributions (husband has disabling health issues).

July 2015

Project Attorney for Senior Legal Services Provider attended the Merced Area Agency on Aging's monthly advisory council meeting on July 27, 2015.

August 2015

Project Attorney for Senior Legal Services Provider attended the Merced Area Agency on Aging's monthly advisory council meeting on August 24, 2015. Project Attorney discussed the Senior Legal Services Program, along with other CCLS programs and services available to residents of Merced County, and discussed possible outreach events with Senior Social Club leaders in attendance.

In CCLS Case No.: 15E-3005921 (see above), Project Attorney made referral to Merced HICAP, and additional follow-up contact with Merced HICAP staff.

September 2015

Project Attorney and Merced Managing Attorney met with analysts and officials from Merced County HAS on September 22, 2015, to discuss the delivery of legal services to target populations, new California Department of Aging guidelines for provision/prioritization of service, provider's fulfillment of grant requirements and expectations, challenges, and targeted areas for improvement moving forward.

Project Attorney attended the Los Banos Salute to Seniors Fair on September 25, 2015. In addition to providing educational literature, Project Attorney personally spoke with 15 individuals about financial scams targeting senior citizens, and the importance of having a current Advance Healthcare Directive and Power of Attorney. Project attorney also answered basic questions about advance (incapacity) planning, estate planning, and the services offered by CCLS.

Project Attorney attended the Merced Area Agency on Aging's monthly advisory council meeting on September 28, 2015, and scheduled a Simple Wills clinic for November after speaking with a senior social club.

**PSA: 32**

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**Provider: Legal Services for Seniors**

**Counties: Monterey**

Optional Success  
Story(ies)/Case Summary(ies)

We assisted an 82-year woman who received In Home Supportive Services ("IHSS" - financial assistance to provide for in-home care for low income seniors, paid by the County, not our client).

Through the IHSS program our client was able to hire a caregiver who, for many years, helped our client with standing, walking, personal hygiene and other tasks. When the caregiver herself reached the age of 72 last year the caregiver was no longer able to provide services to our client. When that happened, our client had to let the caregiver go. The ex-caregiver applied for unemployment from the State of California Unemployment Development Department. After a few months, our client received a notice from the State that she, the IHSS care receiver was responsible for more than \$1,700 in unemployment benefits paid to the ex-caregiver. Our client had never directly paid for the caregiver, it was the County of Monterey through IHSS. Faced with a threat of State penalties if she did not pay, our client came to Legal Services for Seniors for assistance.

When our client came to us about the bill she was being asked to pay by the State, we took her case. We know the IHSS employer (Monterey County) was responsible for unemployment payments, not our client. After we filed an appeal with the State EDD, our advocate made a few phone calls to the EDD, informing them of who correctly was responsible for payments and the EDD personnel agreed they'd made a mistake in charging our client. After those phone calls, we received confirmation the EDD no longer considered our client responsible and had closed their case. If LSS had not been there our 82-year old client would have been unfairly burdened with \$1,700 in unemployment claims and fines.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Legal Services for Seniors continues to collaborate with the Alliance on Aging, the Area Agency on Aging, Watsonville Law Center, the Santa Cruz Senior Citizens Law Center, other agencies and organizations.

**PSA: 33**

**Provider: Greater Bakersfield Legal Assistance, Inc**

**Counties: Kern**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups